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Support Bulletin

Articles

on

RECORDS MANAGEMENT

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## REGULATORY MATERIAL

The Organization is making a concerted effort to eliminate unnecessary regulatory material, to improve the clarity of issuances, and to reduce the number and volume of regulations through more widespread use of handbooks in disseminating technical and procedural instructions and information.

In the summer of 1956 a revised procedure was established for the guidance of those offices which, because of their functions, were responsible for preparing the majority of the regulatory material issued, i. e., administrative, fiscal, and support activities. This procedure provided for a more adequate system of preliminary screening to insure that the proposed regulatory issuance was necessary, instituted more effective means of controlling and limiting coordination, and placed greater emphasis upon the desirability of using handbooks to disseminate procedural details and instructions.

The biggest problem encountered to date has been in the development of handbooks. Paragraph 3   defines the different types of issuances and, in distinguishing between regulations and handbooks, insofar as procedural material is concerned, states that regulations will contain only *essential procedures*. From a practical standpoint, it has not been possible to establish a hard and fast rule or definition for essential procedures. Consequently, offices drafting regulations have been confronted with a real problem in determining what should go in a regulation and what should go in a handbook.

Suffice it to say that our primary objective is to develop a set of regulations which, stated simply, would enable an employee to read and digest them, and by so doing, have a good understanding of the policies of the Organization, how it is organized, what its responsibilities and authorities are, and information on where to turn for more detailed or procedural instructions. This means, of course, that we must develop more handbooks; the idea being that while *certain* groups of employees are concerned daily with *certain*

procedures and details, they are not all concerned with all of the details. Likewise, many employees are rarely, if ever, concerned with detailed procedures. These points are made only to emphasize the desirability of having a set of regulations which is brief, clear, understandable to all, and not filled with a variety of detailed and sometimes complicated procedural instructions which are of concern to only a few. Another argument in favor of more handbooks is that sheer volume of regulations tends to discourage people from referring to them.

After considering several approaches to the matter of developing more handbooks, it was determined that, rather than attempt to deal with the problem on a piecemeal regulation-by-regulation basis, it would be better to take an entire series and make a project of separating all the detailed procedural and instructional material for inclusion in a handbook. In the meantime, this would not delay the publication of proposed regulations which have been in the mill for some time and which are urgently needed.

## SUPPLEMENT TO PERSONAL HISTORY STATEMENT

The Personal History Statement has recently been revised to include material previously obtained from other personnel forms. A special Supplement to the Personal History Statement has been devised to facilitate the reporting and recording of additional qualifications or personal-status changes of on-duty personnel. These Supplements are now being distributed to headquarters employees on the anniversary of their entrance on duty with the Organization to bring their present records up to date. Following this initial survey, the Supplement forms will be available for use at any time but each headquarters employee will be asked to complete an abbreviated version annually. Individuals departing for or returning from field assignments complete these forms as a part of their processing.

The coding system for recording qualifications and personal data is being revised to extend its item coverage and provide more detailed information. These records are becoming increasingly useful tools in implementing programs for the assignment and development of personnel. The importance to each individual of keeping his official record current as to his status and qualifications cannot be overemphasized. The Supplement to the Personal History Statement is the principal means for accomplishing this.

~~While not conclusive that excessive overtime was the cause, a recent staff study on overtime practices in one area disclosed that excessive overtime was accompanied by a higher than average use of sick leave.~~

## MANAGEMENT TOOLS

### PAPERWORK MANAGEMENT

It has been estimated that the Government creates and handles some 25 billion pieces of paper each year and spends 4 billion dollars in the process. It has also been estimated that 255 million dollars of this amount could be saved by greater emphasis on paperwork economy.

The Organization is singularly obligated to practice paperwork economy. Each year we create enough material to fill more than 11,000 4-drawer safes. It would require a file drawer more than 24 miles long to store the records we have in our files today. Much of this volume is justifiable. The growth of the Organization, the nature of our work, and the security measures we must observe have been responsible for much of our large records holdings and high paperwork costs.

Paperwork costs fall logically into two general categories: the cost of creating and processing paper and the cost of filing and storing paper. Substantial savings in both these areas are possible. Records creation and processing costs can be cut by improving the quality and reducing the quantity of forms, reports, correspondence, etc., as well as by simplifying procedures for processing records. These costs are in direct proportion to the costs of keeping records—the more money you spend creating records, the more money you must spend to take care of them.

You can reduce the cost of keeping records not only by closely controlling the cost of creating them but also by controlling filing and storage costs through use of modern, efficient methods for filing current records. Your

### PROTECTION OF FUNDS

Paragraph 8b(1)   specifies that the combination of safes containing Organization funds be known only to the actual custodian. If the requirements of a station demand that more than one person have access to Organization funds and separate safes are not available for such purposes, separate lock boxes should be used in order that there may be no divided responsibility for the safekeeping of funds.

### DO YOU KNOW . . .

The average age of Organization employees today is 31.7 years. Two years ago it was 34.1 years.

The Organization's ratio of veterans to non-veterans is 53% veterans — 47% nonveterans. Two years ago it was 52% and 48%.

The Organization's ratio of males to females is 61% males — 39% females. Two years ago it was 60% and 40%.

Approximately 98% of those Organization employees eligible, applied for and have been accepted into the Career Staff.

Four hundred and thirty Organization employees had one thousand or more hours of sick leave at the close of the 1956 leave year.

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office should follow a plan that answers these questions: What should be filed and for how long? Where should files be located? What systems, supplies, and equipment should be used? If it does not, it is unlikely that your office is getting the most out of its filing dollar.

Further savings are possible through the transfer of inactive and semiactive records from costly office equipment and space to inexpensive decentralized Records Center storage at headquarters. The Organization's Records Control Program authorizes such transfers, and specific Records Control Schedules have been developed for most headquarters offices. Look up your schedule, see how it applies to your records, and mark the records retirement dates on your calendar. If you have a records-retirement problem, seek the advice of your Area Records Officer. Remember, Records Center storage is much less costly (in equipment, space, and personnel) than

storage of inactive files in your own office, and documents or whole files can be withdrawn from the Records Center in less than 24 hours, if necessary.

Reduction in paperwork costs requires constant day-to-day judgment and careful attention to the creation of records, their filing, storage, and ultimate disposition. Constant striving to improve the quality and reduce the quantity of our paperwork will produce more efficient operation of the entire Organization and help materially in the fulfillment of our various missions. While much progress has been made, a great deal still remains to be done. The Management Staff is prepared to render service in all aspects of paperwork management from the creation of a record through its life span as an active document to its retirement or destruction. Future issues of the Support Bulletin will present more specific information to help you manage your paperwork program more efficiently and economically.

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## CIVIL SERVICE RETIREMENT

(This is the third of a series of articles on the liberalized  
Civil Service Retirement (CSR) Act.)

### NEW HIGHS IN WIDOW AND WIDOWER BENEFITS

Benefits which can be paid to widows and widowers of employees have been boosted to new highs by the CSR law. Also, the cost to a retiree has been sharply cut. It is only 2½ percent on the first 2400 dollars of an annuity, plus 10 percent on any remainder.

In addition, the retiree has the option of applying the discount only to part of his annuity. In either case, the survivor would be paid half of the sum discounted.

For example: Say your annuity is 3000 dollars and you wish to provide the maximum for your survivor. It would be discounted at 2½ percent of 2400 (60 dollars), and 10 percent on the remaining 600 (60 dollars), a total of 120. Your annuity would be 2880 and your survivor would be paid half of your 3000 basic annuity, or 1500 dollars.

But let's say you believe that your spouse could get along on 1000 dollars a year. You'd take the 2½ percent discount on 2000 (50 dollars). Your annuity would be 2950 and your survivor would get half of 2000 (1000 dollars).

This election would have to be made at the time the employee retires, and his decision would be irrevocable.

Benefits to surviving spouses of retirees would continue until death or remarriage. No minimum amounts are guaranteed them.

If you elect survivor benefits and your spouse dies first, the discount will continue in effect. Also, if you remarry, you can't name your new spouse to get survivor benefits.

Formerly, a retiree who elected to provide for his survivor had his annuity reduced by 5 percent of the first 1500, by 10 percent over

1500, and by ¾ of 1 percent for each year his wife was under age 60 when he retired. The new law does not reduce the annuity because of the survivor's age.

The widower of a worker who dies in service will be paid an annuity only if he's incapable of self-support and had been receiving at least half of his support from his wife.

A widow or dependent widower is now eligible for benefits at any age, and as a general rule the payments will be half of the employee's earned annuity. The old law required a widow to be at least 50 to be paid benefits, unless there were children under 18.

An employee who retires now on a deferred annuity at age 62 after only 5 years of service will have the right to elect survivor benefits. Formerly, an employee could retire at age 62 if he had 5 years of service, but 15 years of service was required to provide survivor benefits.

The surviving member of husband-and-wife teams can be paid both retirement and survivor benefits if the legal requirements are met.

### CHILDREN'S BENEFITS BOOSTED 150 PERCENT

Benefits for surviving children have been increased an average of 150 percent. However, Congress tightened the law to require that if the employee leaves a spouse, a surviving child must have received "more than half of his support" from the employee to be eligible for payments.

In a case where either a wife or a husband survives, dependent children will be paid the least of: 600 dollars per child; 40 percent of the employee's average salary divided by the